

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

Transaction Number	Transaction Date	Provider Name	Course Name	Course Group	Credits	Course Summary
17016254	3/18/2019	CEU Institute, Inc.	Aging with Spinal Cord Injury (1hr) Webinar	Adjuster	General: 1	The course addresses management, casualty and disability insurance. Discusses in-depth evaluation of individuals with spinal injuries, scope and depth of evaluation, specialty participants and four case studies associated with current and previous function status.
261315187	3/18/2019	National Alliance for Insurance Education and Research	No Business is an Island: A Closer Look (Webinar)	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses adding dependent properties to business coverage, types of dependent properties, broad versus limited form coverage, international dependent property exposures, underwriting considerations and four short case studies.
261315187	3/18/2019	National Alliance for Insurance Education and Research	No Business is an Island: A Closer Look (Classroom)	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses adding dependent properties to business coverage, types of dependent properties, broad versus limited form coverage, international dependent property exposures, underwriting considerations and four short case studies.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

1523678061	3/18/2019	Nationwide Life Insurance Company	Investment Options for Retirement Plans - Traditional Financial Assets vs. Insurance Company Products	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses financial assets, insurance products, guaranteed interest contracts, defined benefit and contribution plans and investments for each.
173776101	3/19/2019	Nationwide Life Insurance Company	Incorporating HSAs into Retirement Planning	Life	General: 1	The course addresses product knowledge of disability insurance. Discusses health savings accounts, contribution limits, reimbursement, eligibility, maximizing savings, and asset distribution.
1623204898	3/19/2019	PayneWest Insurance, Inc.	Claims-Managing Misconceptions, Misunderstandings and Mistaken Expectations- WEB BASED CLASS	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Washington. Discusses insured claim expectations, communicating with the insured, identifying realistic and unrealistic claim expectations, claim issues, subrogation and assisting the insured.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2282406998	3/19/2019	Nationwide Life Insurance Company	Effect of Corporate Stock or Asset Sales and/or Mergers on Qualified Retirement Plans	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses types and effects of corporate ownership transfers, corporate buyer and seller retirement plans, and the effect of the changes the retirement benefits of employees of both parties.
2430394263	3/19/2019	PayneWest Insurance, Inc.	Claims-Managing Misconceptions, Misunderstandings and Mistaken Expectations-LIVE CLASS	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Washington. Discusses insured claim expectations, communicating with the insured, identifying realistic and unrealistic claim expectations, claim issues, subrogation and assisting the insured.
2578137680	3/19/2019	Quest Continuing Education Solutions	Thriving in the New Work-Life World	Life	General: 1	The course addresses product knowledge of life and disability insurance. Discusses employer-offered benefits, benefit relevancy, traditional versus non-traditional benefits, retirement healthcare costs, educating employees regarding function of products and supplemental benefit options.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

351828937	3/20/2019	Nationwide Life Insurance Company	Cyber and Data Security Issues for ERISA-Covered Retirement Plans	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Ohio. Discusses data and cyber security, ERISA fiduciary responsibilities, IRS requirement for safeguarding taxpayer data, state laws and data breach requirements.
1132938178	3/20/2019	Athene Annuity and Life Company	Social Security Optimization - How Delay Impacts Benefit Values and Taxation	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses calculation of social security benefits, cost of living adjustments, delayed retirement credit, provisional income and determination taxation of a social security benefit, and survivor benefits.
470810873	3/21/2019	Montana Insurance Education Foundation, Inc.	Personal Umbrella Coverage, Exposure & Loss Examples and Growth Opportunities	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty coverage. Discusses coverages provided by personal umbrella, exposures and losses, bundling personal umbrella with property and casualty coverage and one case study.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2563786428	3/21/2019	Delta Dental Insurance Company	The Changing Landscape for Disability Dental: Challenges & Opportunities	Disability (Health)	General: 1	The course addresses product knowledge of disability insurance. Discusses health care delivery, trends in the health insurance market, care provider and consumer trends, and legislation.
351652254	3/22/2019	Burns & Wilcox	Commercial Excess & Umbrella Insurance-Webinar &	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses umbrella versus commercial excess liability policies, additional limits versus additional coverages, use in business coverage, policy forms, underlying policy requirements, exposure, rating and catastrophic claims.
667831582	3/22/2019	Producers AG Insurance Company, dba PROAG	2020 Livestock Gross Margin Training (LGM) Webinar	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses livestock gross margin coverage, limitations, insurability, policy requirements, function of livestock gross margin coverage, underwriting and administrative requirements.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

708393899	3/22/2019	International Foundation of Employee Benefit Plans	EL161 Self-Funded Health Plan Basics	Life	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Wisconsin. Discusses group health plans, employer self-funded medical benefit plans, advantages and disadvantages of self-funded plans, advantages and disadvantages of fully insured plans, plan design, and lowering risk exposure.
708393899	3/22/2019	International Foundation of Employee Benefit Plans	EL93-Overview of Prescription Drugs	Life	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Wisconsin. Discusses prescription drug coverage options, types of drugs, brand name versus generic drugs, prescription assistance programs, prescription drug plan structure, and using prescription drug coverage.
708393899	3/22/2019	International Foundation of Employee Benefit Plans	EL24 Fiduciary Responsibility for ERISA Plans	Life	General: 2	NAIC Uniform submission, 2 computer-based, self study credit hours approved by Wisconsin. Discusses federal ERISA requirements, the role of a fiduciary, fiduciary duties to the plan, policies and procedures, professional with fiduciary status, and enforcement of fiduciary standards.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

708393899	3/22/2019	International Foundation of Employee Benefit Plans	EL158 Health Savings Accounts (HSAs)	Life	General: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Wisconsin. Discusses the combination of health savings accounts and high-deductible health plans, health savings account eligibility, individual versus employer contributions, account distributions, advantages and disadvantages of health savings accounts.
1071719297	3/22/2019	HealthEquity, Inc.	Health Savings Accounts: Connecting Health and Wealth	Disability (Health)	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Utah. Discusses costs of health care and retirement, saving issues, qualified plan health savings accounts, eligibility requirements, IRS deductibility limitations, Medicare restriction, and taxation of withdrawals from a health savings account.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2700134946	3/22/2019	PT&C FORENSICS, INC dba PT&C LWG FORENSIC CONSULTING SERVICES and dba Envista Forensics	Webinar: Waterproofing Systems	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses types of waterproofing materials and installation, building code requirements, installation defects, litigating the installation or material defect claim, manufacturer certification, mediation and pre-courtroom discovery.
2158219181	3/26/2019	Burns & Wilcox	Occurrence vs. Claims-made Policy Forms-Webinar	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses occurrence versus claims-made policy forms, claim lifespan, claim reporting, policy factors, retroactive date and two case studies showing the effect of each policy form on a claim.
2634888829	3/26/2019	Broker Educational Sales and Training, Inc	IRA Beneficiary Planning I	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses beneficiary planning, naming or designating a beneficiary, required benefit distribution, spousal versus non-spouse beneficiary planning, multiple beneficiaries and the estate or a charity as beneficiary.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2634888829	3/26/2019	Broker Educational Sales and Training, Inc	IRA Planning I	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses individual retirement accounts, individual retirement annuities, contributions, tax deductibility, Roth IRAs, conversions, rollovers and federal DOL conflicts of interest.
2948434580	3/26/2019	National Alliance for Insurance Education and Research	CRM - Financing of Risk (Classroom) II	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses fundamentals of risk financing, risk financing methods, alternate risk transfer, and risk financing team members.
2948434580	3/26/2019	National Alliance for Insurance Education and Research	CRM - Financing of Risk (Webinar) II	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses fundamentals of risk financing, risk financing methods, alternate risk transfer, and risk financing team members.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

4015369153	3/27/2019	National Association of Insurance and Financial Advisors Montana	Common Mistakes in Estate Planning	Life	General: 2	The course addresses product knowledge of life insurance. Discusses wealth transfer errors, incapacity, direct versus trust distribution, transfer documents, asset ownership, tax-free transfers, qualified plans, charitable transfers and procrastination.
1986963441	3/28/2019	Burns & Wilcox	Understanding Flood Insurance-Webinar	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses underwriting factors, flood coverage options, the National Flood Insurance Program, flood zones, rate maps, elevation certificates, valuating flood risk and policy considerations.
2535301434	4/2/2019	Producers AG Insurance Company, dba PROAG	2020 Livestock Risk Protection (LRP) Training Webinar	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses livestock producer plan benefits, insurability, indemnity, policy requirements, endorsement provisions, underwriting, the function of livestock risk protection policies, processes and administration of policies.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2800690935	4/2/2019	Producers AG Insurance Company, dba PROAG	Dairy Revenue Protection (DRP) Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses dairy revenue protection, insurability, policy requirements, pricing options, claims, federal requirements, and loss examples.
1091013283	4/3/2019	Insight Insurance Consulting	CLIC #6 - Retail/Wholesale Business Segment Exposures and Insurance Solutions	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses retail and wholesale risks, risk management, operation and operational relationship review, exposures, coverages, and specialty coverages.
1091013283	4/3/2019	Insight Insurance Consulting	CLIC #5 Manufacturing Business Segment Exposures and Insurance Solutions	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses manufacturing risks, risk management, basic coverages, specialty coverages, price endorsement and business income limit determinations, warehouse and distribution coverage, crisis management endorsement and one case study.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

1360027343	4/4/2019	CE University- ceu.com	HSA's-Not Just Another Acronym-WageWorks Training	Disability General: 2 (Health)	NAIC Uniform submission, 2 classroom credit hours approved by Pennsylvania. Discusses high deductible health plans, health savings account-qualified high deductible health plan, enrollment requirements, business and individual contributions, penalties and best practices.
1485309972	4/4/2019	CRC Insurance Services	Demystifying D&O: Understanding Directors & Officers & Company Liability	Property & Casualty	NAIC Uniform submission, 2 classroom credit hours approved by Alabama. Discusses corporate governance, directors and officers liability coverage, exposures, policy elements, endorsements, claims and underwriting.
1485309972	4/4/2019	CRC Insurance Services	Cyber RX: Your Prescription to Understanding and Managing Cyber Risk	Property & Casualty	NAIC Uniform submission, 2 classroom credit hours approved by Alabama. Discusses exposures, data breach, notification laws, first- and third-party costs, cyber and data privacy, consequences of delayed notification and underwriting issues.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

1590698143	4/4/2019	National Alliance for Insurance Education and Research	2019 Ruble Graduate Seminar-PC XVIII	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses decision and executive risk coverages, cyber risk exposure, time element coverage and general liability insurance.
1965440581	4/4/2019	Montana Land Title Association	MLTA 2019 Spring Ed - Friday	Title	General: 2	The course addresses product knowledge of title insurance. Discusses the effect of limited liability corporation ownership in series on a title and title insurance on Indian lands.
2046012127	4/4/2019	Montana State Compensation Insurance Fund	MSF 19th Annual Medical Conference - Ethics	Ethics	Ethics: 2	The course addresses ethics. Discusses workers' compensation claim ethical obligations, investigating social media, the negative effect of opioid prescriptions, the ethics of relieving pain, and using non-pharmaceutical pain relief.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2046012127	4/4/2019	Montana State Compensation Insurance Fund	MSF 19th Annual Medical Conference	Disability (Health)	General: 7	The courses addresses product knowledge of casualty and disability insurance. Discusses workers' compensation abled and healthy living goals, disability due to lower back pain, public safety worker injury, evidence-based claim decisions and treating chronic pain.
2886133014	4/4/2019	Montana Land Title Association	MLTA 2019 Spring Ed - Thursday	Title	General: 8	The course addresses product knowledge of title insurance. Discusses railroad rights-of-way, the American Land Title Association priorities, title insurance policy interpretation, the effect of riparian area law on titles and title insurance and underwriting.
4040616470	4/4/2019	CEU Institute, Inc.	Essentials of Regulations, Statutes, and Motor Carrier Liability Coverage (TRIP) (6hr)	Property & Casualty	General: 6	The course addresses product knowledge of property and casualty insurance. Discusses commercial auto insurance statutes, motor carrier regulations, the business auto policy, and motor carrier policy.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

668715054	4/5/2019	CLM Group, Inc., dba Claims & Litigation Management Alliance	2019 CLM Midwest Conference	Adjuster	General: 5	The course addresses product knowledge of property and casualty insurance and management. Discusses fire investigation, product liability, defective machines, expert witnesses, personal risk exposure in houses of worship, broker liability exposure, environmental liability, sexual harassment and discrimination claims, traumatic brain injuries, and autonomous vehicle risks.
832032788	4/5/2019	Producers AG Insurance Company, dba PROAG	Crop Insurance 301 Webinar	Adjuster	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses actual production history, policy exceptions, claim types, additional crops, and coverage options.
832032788	4/5/2019	Producers AG Insurance Company, dba PROAG	Crop Insurance 101 Webinar	Adjuster	General: 4	NAIC Uniform submission, 4 web-based classroom credit hours approved by Texas. Discusses the federal crop insurance program, terminology, multi-peril crop insurance, the application process, unit structure, and plans of insurance.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

1545319983	4/5/2019	American College (The)	19-104 Special Care Symposium	Long Term Care	General: 8	NAIC Uniform submission, 8 classroom credit hours approved by Pennsylvania. Discusses medical expense deductions, caring for individuals with special needs, dependent defined, special needs trusts, and trust administration.
366680648	4/6/2019	Montana Land Title Association	2019 MLTA Spring - Ethics	Ethics	Ethics: 2	The course addresses ethics. Discusses unethical behavior, codes of ethics, professional ethics, legal versus right, honesty and integrity.
209653490	4/8/2019	Marsh USA, Inc.	Transactional Risk	Property & Casualty	General: 2	The course addresses property and casualty insurance and management. Discusses representations and warranties insurance, tax indemnity and contingent liability insurance
1706941699	4/8/2019	Marsh USA, Inc.	Contract Review - Understanding Insurance Requirements, 2nd Edition	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses contract review, types of contracts, contractual liability coverage, policy provisions, indemnification agreements and three case studies.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2121380929	4/8/2019	DF Institute, dba Kaplan Financial	Principles of Retirement Planning, 7th Edition	Disability (Health)	General: 12	NAIC Uniform submission, 12 computer-based , self study credit hours approved by Illinois. Discusses the retirement planning process, demographics, retirement income analysis and sources, life insurance and annuities, investment products, qualified employer retirement plans, plan priorities, distributions, non-qualified executive benefits, Medicare, and wealth distribution.
2287822084	4/8/2019	DF Institute, dba Kaplan Financial	Commercial Auto Rating, 8th Edition	Property & Casualty	General: 7	NAIC uniform submission, 7 computer-based, self study credit hours approved by Illinois. Discusses commercial auto coverage, commercial auto insurance rating, rating commercial trucks and tractor-trailers, primary and secondary rating factors, rating zone and rated risks, vehicles under optional classification, dealers coverage form, and errors and omissions coverage.
3220018748	4/9/2019	One Call Care Management	Handling Ethical & Moral Dilemmas in the Claims Management Process	Ethics	Ethics: 1	The course addresses ethics. Discusses ethical versus unethical behavior, morals and morality, ethical theories and three case studies.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2829115497	4/10/2019	National Alliance for Insurance Education and Research	Lloyds – The Insurance Marketplace (Webinar)	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses the business of Lloyd's, market structure, underwriting performance, global insurance and capital, the United States excess and surplus industry, and governance.
2829115497	4/10/2019	National Alliance for Insurance Education and Research	Cyber Liability-What Every Agent Should Know (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses builders' risk and installation floaters, commercial liability endorsements, life insurance and annuities, yacht insurance and insurance expert witnesses.
2829115497	4/10/2019	National Alliance for Insurance Education and Research	Cyber Liability-What Every Agent Should Know (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses builders' risk and installation floaters, commercial liability endorsements, life insurance and annuities, yacht insurance and insurance expert witnesses.

Montana Insurance Continuing Education Advisory Council meeting - April 17, 2019

2829115497	4/10/2019	National Alliance for Insurance Education and Research	Lloyds – The Insurance Marketplace (Classroom)	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses the business of Lloyd's, market structure, underwriting performance, global insurance and capital, the United States excess and surplus industry, and governance.
3963340247	4/11/2019	Quest Continuing Education Solutions	Living Benefit Riders	Life	General: 1	The course addresses product knowledge of annuities. Discusses tax-deferred annuities, income annuities, living and death benefit riders, suitability guidelines and process management.

Individual Course Submissions

Debra Daniels 3/14/2019	Vision: Critical Factors in Brain Injury Rehabilitation, Centre for Neuro Skills	Disability General: 1 (Health)	The course addresses product knowledge of disability. Discusses the effect of vision therapy on rehabilitation of brain injuries, photophobia, muscle and nerve damage, visual and spatial perception, clinical observation of injury effects and changes in visual fields.
Debra Daniels 3/20/2019	Anoxic Hypoxic Brain Injury, QLI	Disability General: 1 (Health)	The course addresses product knowledge of disability. Discusses the need for oxygen by a brain, effect of reduced oxygen on a brain, timeframes to temporary or permanent injury, causes of anoxic brain injury, respiratory suppression, and pharmacological effects.